



Writing an Effective Work Plan and Evaluation Plan

December 19, 2016





Agenda

- Welcome
- Overview of Cooperative Agreement
- Review of project planning phase
- Tips on writing project objectives, activities and tasks
- Structure and content of evaluation plan
- Questions



Cooperative Agreement

A Cooperative Agreement provides for the substantial involvement and collaboration of AoA/ACL in activities that the recipient organization will carry out in accordance with the provisions of the approved grant award.




Project Planning Phase

During the planning phase, the grantee develops a revised work plan that will accomplish the grant's goals and objectives and is acceptable to AoA/ACL.




Work Plan Components

- Project goal
 - Individual objectives
 - Activities
 - Tasks
 - Lead Person
 - Timeline
- 




Task Details:

- Contract development
 - Participant identification/recruitment
 - Specific curricula or training programs being used
 - How, when and where services or programs will be delivered
 - Regular meetings or communications with project team and partners
 - Staff training or protocols that need to be developed
 - Outputs, outcomes and outcome measures (OR separate evaluation plan)
 - Plans for building the systems and funding needed to sustain each activity
 - Which components address the evidence-based or evidence-informed requirement
- 



Tips on Writing an Effective Work Plan

- Spell out words or names the first time
 - Be specific
 - Allow sufficient time for planning, contracts and training
 - Find someone who can review objectively
- 



Sample objective

Provide effective care/supportive services to persons living with moderate to severe impairment from ADRD and their caregivers



Sample Activity

Train agency staff on dementia and care planning

Sample Tasks

- Identify dementia training for staff to include three sessions on dementia basics, effective communication with individuals and families, and care planning
- Develop pre-post evaluation to assess change in knowledge and change in attitudes
- Conduct agency-wide training during annual 2-day staff retreat
- Train new hires and conduct refresher trainings every quarter on dementia basics, effective communication with individuals and families, and care planning

Sample objective

Original

Assist people with dementia in remaining at home and provide caregiver support

Rewrite

- Assist people with dementia to remain independent at home by providing them with home and community-based services
- Provide caregiver support through respite services and caregiver training



Sample activity

Original

Provide respite services

Rewrite

Provide respite services to
caregiving families in
Forester and Omni
Counties

Sample tasks

Original

Identify and refer families
for respite program

Rewrite

- Develop criteria for program participation
- Identify potential participants from existing clients receiving case management and through outreach to other community partners
- Screen and enroll interested participants in one of the 5 designated respite program sites

Work Plan Resources

- Template in Word and Excel
- Tips sheet on writing effective work plans
- Sample work plan
- Webinar to be archived for future reference
- [Training Resources Compendium](#)



Evaluation Plan

Where to document evaluation plans


- Work plan OR
- Separate document

Who is taking the lead on evaluation?





Components of the evaluation plan

- Objective
 - Activity
 - Outputs
 - Outcomes
 - Outcome measures
 - Data collection – who, when, quality
 - Data analysis and reporting
- 

What evaluation is NOT (for these grants)

- x NOT a research project
- x NO randomized control trials
- x NO external comparison groups
- x NOT just “outputs” or satisfaction surveys

Evaluation plan tips

- ✓ DO Use existing validated measures wherever possible
- ✓ DO Use pre/post tests when reasonable
- ✓ DO Plan for ways to reduce nonresponse
- ✓ DO Tailor the outcomes and measures to the activity



Evaluation plan example: Savvy Caregiver Training

Objective: Deliver behavioral symptom management training and expert consultation for family caregivers

Activity: Conduct Savvy Caregiver workshops

Outputs: 75 attendees (5 workshops; 15 attendees/workshops)

Evaluation plan example, continued

Outcomes and outcome measures

- Increased caregiver self-efficacy (Revised Scale for Caregiving Self-Efficacy)
- Decreased depression (PHQ-9)
- Decreased burden (Zarit Burden Interview)
- Increased quality of life for person with dementia (QoL-AD)

Target: Statistically significant improvement from baseline to post-intervention on all four measures

Be specific!

Not specific:

Caregivers will be able to cope with caregiving and will help the person with dementia remain home longer

Better:

Caregivers' Zarit burden scores will decrease, and caregivers will be less bothered by behavioral symptoms as measured by the Revised Memory and Behavior Problems Checklist.


Evaluation plan example, continued

- Who: Evaluator will conduct all assessments
- When/how often
 - Assessments will be conducted at:
 - Baseline (the first session will be 20 minutes longer to allow for completing paperwork)
 - Within one week after completing Savvy Caregiver workshop
 - 6 months post-completion by telephone (the evaluator will make 3 attempts to reach participants)
- Results will be analyzed after the first session and then semi-
- annually



Technical Assistance for Grantees

Overall design of evaluation plan


- Identifying targeted outcomes and outputs
 - Creating data collection plans
 - Creating data analysis plans
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Evaluation Resources

- Templates (Word and Excel)
- Sample evaluation plan
- [Measures resource list](#)
- [Evaluation of Dementia Programs](#) (webinar)



Summary

- Work plans must be approved to move to implementation
 - Be clear and thorough in describing plans
 - Be detailed
 - Include evaluation plans, as part of work plan or separately
 - Refer back to listed resources
 - Request help from TA liaison and project officer
- 



Questions?

